
King County METRO

# 2015 Rider / Non-Rider Survey
# Executive Summary

June 2016

Research conducted for:
King County
Department of Transportation
Metro Transit Division

By:

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King County METRO We'll Get You There

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# EXECUTIVE SUMMARY

## Project Overview

King County Metro Transit places high value on customer feedback. For more than 25 years, Metro has conducted an annual telephone survey of King County residents—both those who ride Metro buses and those who do not.

## Objectives

- Provide a reliable measure of market share
- Track awareness and perceptions of Metro services among both Riders and Non-Riders
- Identify and track demographic characteristics, attitudes, and transit use among Riders and Non-Riders
- Provide insight about topics related to Metro's service, marketing, and communications strategies

The study is widely used by different Metro sections, it provides important information on current and past performance, and it helps provide direction for future strategies.

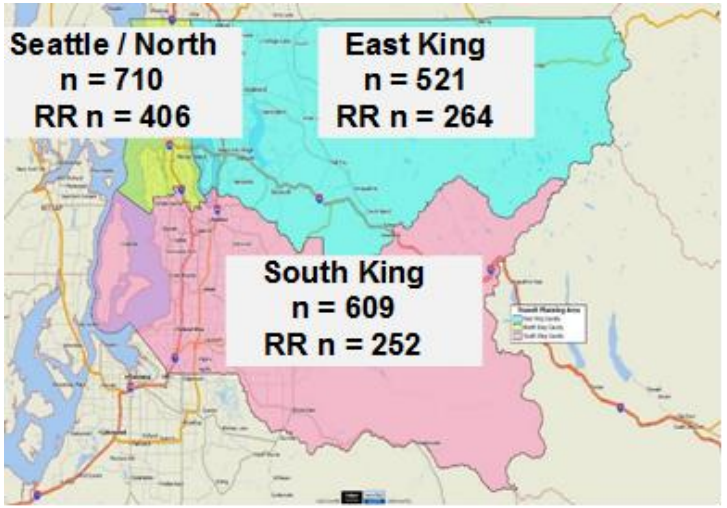
## Methodology

The survey uses a robust dual-frame sample (calling both landline and cell-phone numbers) to reach a representative sample of all King County households. Riders are surveyed annually and Non-Riders biennially (typically in odd-numbered years). In 2015, 1,840 interviews were completed with three segments of Riders and Non-Riders:

| Segment | Definition | Total Sample (n) |
|---|---|---|
| Regular Riders | Riders who took five or more one-way rides in the past 30 days | 922 |
| Infrequent Riders | Riders who took 1-4 one-way rides in the past 30 days | 103 |
| Non-Riders | Have not ridden Metro in the past 30 days | 815 |

The sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area (400 in Seattle / North King County and 250 each in South and East King County).

Actual interview totals for each area are shown at right ("n" refers to total completed interviews; "RR n" refers to Regular Rider interviews). Data are weighted to reflect area populations, and additional weighting reflects landline and cellphone incidence and a supplemental sample of low-income respondents.

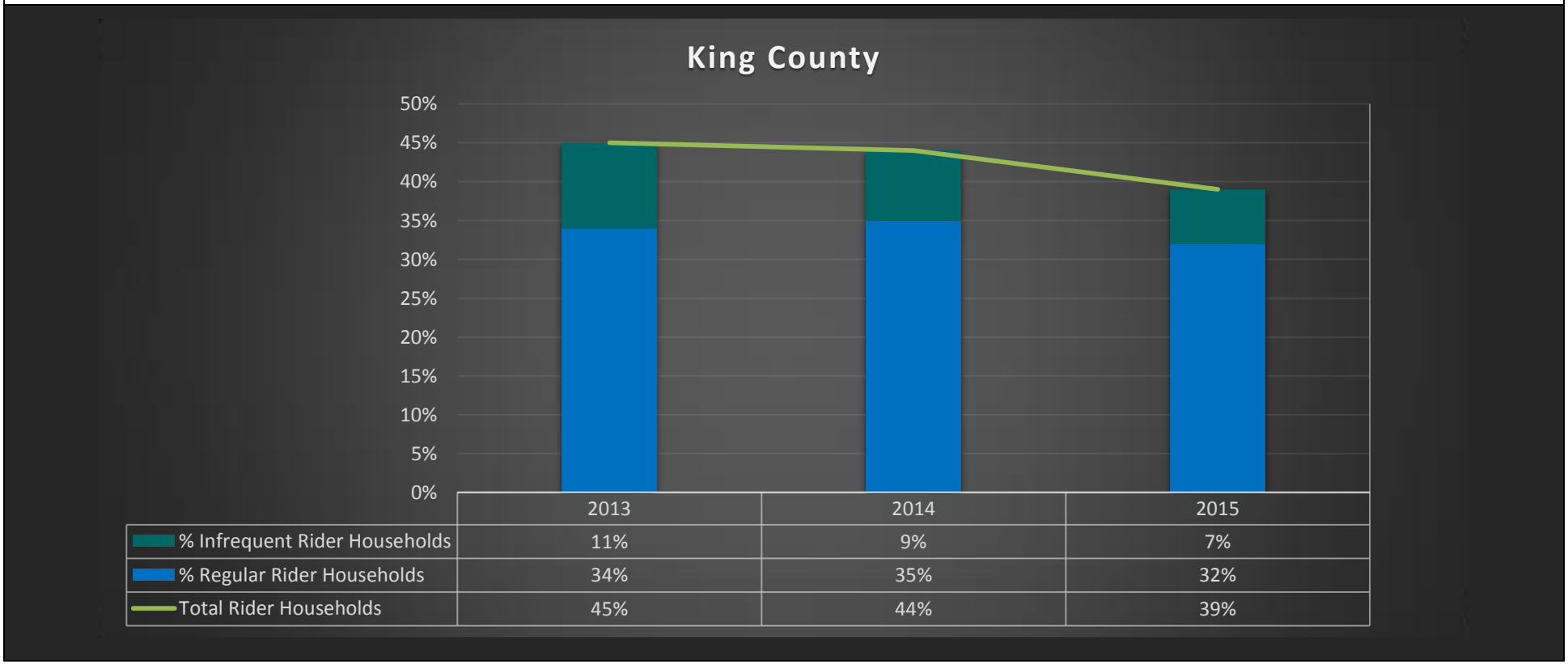


## Key Findings:

### MARKET SHARE

**Metro continues to serve as an important mode of transportation for a significant percentage (39%) of King County households.**

Nearly two out of five King County households use Metro on a regular or semi-regular basis. This percentage has been decreasing since its peak in 2013, due to a year over year decrease in the percentage of Infrequent Rider households. The percentage of Regular Rider households decreased slightly but this decrease is not statistically significant. Metro's total ridership grew slightly in 2015, and this is partly reflected by an increase in the average number of monthly trips seen in the study among Riders (see next page).




| | 2013 | 2014 | 2015 |
|---|---|---|---|
| % Infrequent Rider Households | 11% | 9% | 7% |
| % Regular Rider Households | 34% | 35% | 32% |
| Total Rider Households | 45% | 44% | 39% |

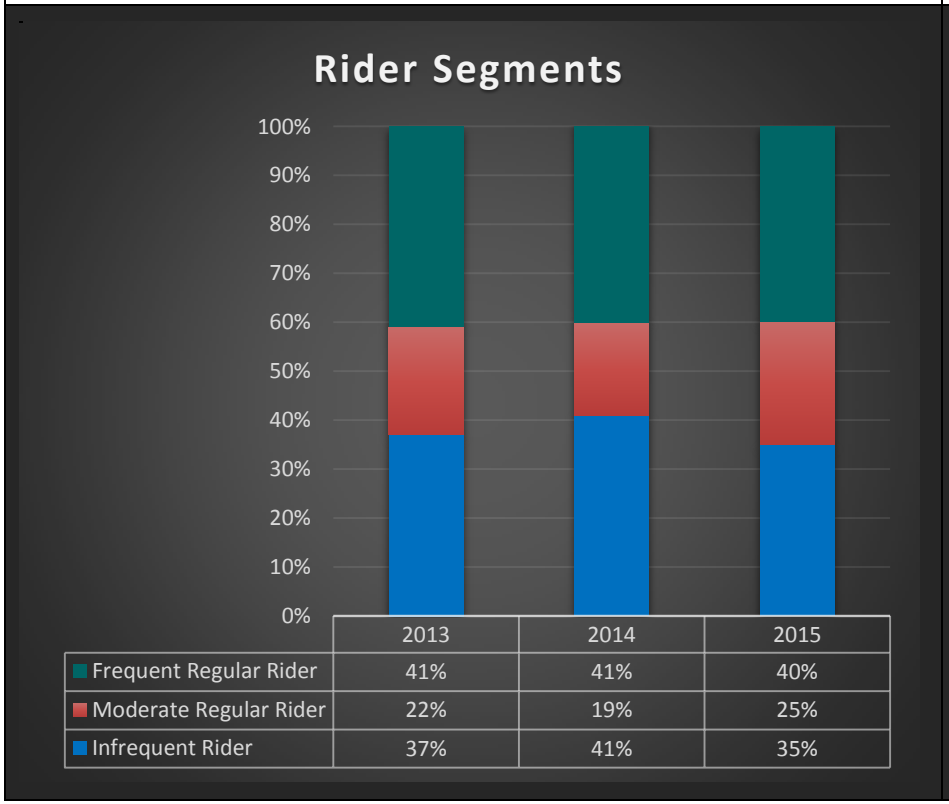
## TRANSIT USE

**Metro has three Rider segments, based on the number of monthly trips they take. Frequent Regular Riders (11+ one-way trips monthly) continue to be Metro's core market, representing 40% of all Riders and accounting for nearly 85% of all trips.**

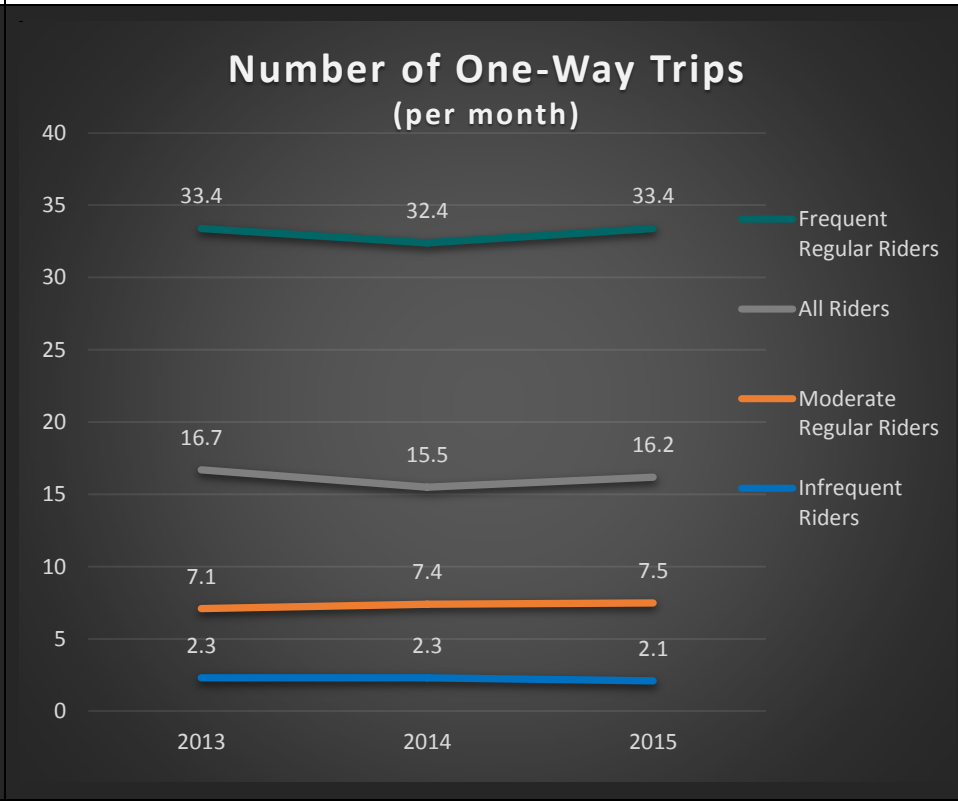
The percentage of Riders who are Regular Riders increased significantly in 2015 due to an increase in the percentage of Moderate Regular Riders (between 5 and 10 one-way rides monthly) and a corresponding decrease in the percentage of Infrequent Riders (1-4 rides per month).

The average number of one-way trips Riders take decreased in 2014 but increased 5% in 2015.

At least some of Metro's increased ridership in recent years can be attributed to more Moderate Regular Riders taking slightly more trips.




| | 2013 | 2014 | 2015 |
|---|---|---|---|
| Frequent Regular Rider | 41% | 41% | 40% |
| Moderate Regular Rider | 22% | 19% | 25% |
| Infrequent Rider | 37% | 41% | 35% |

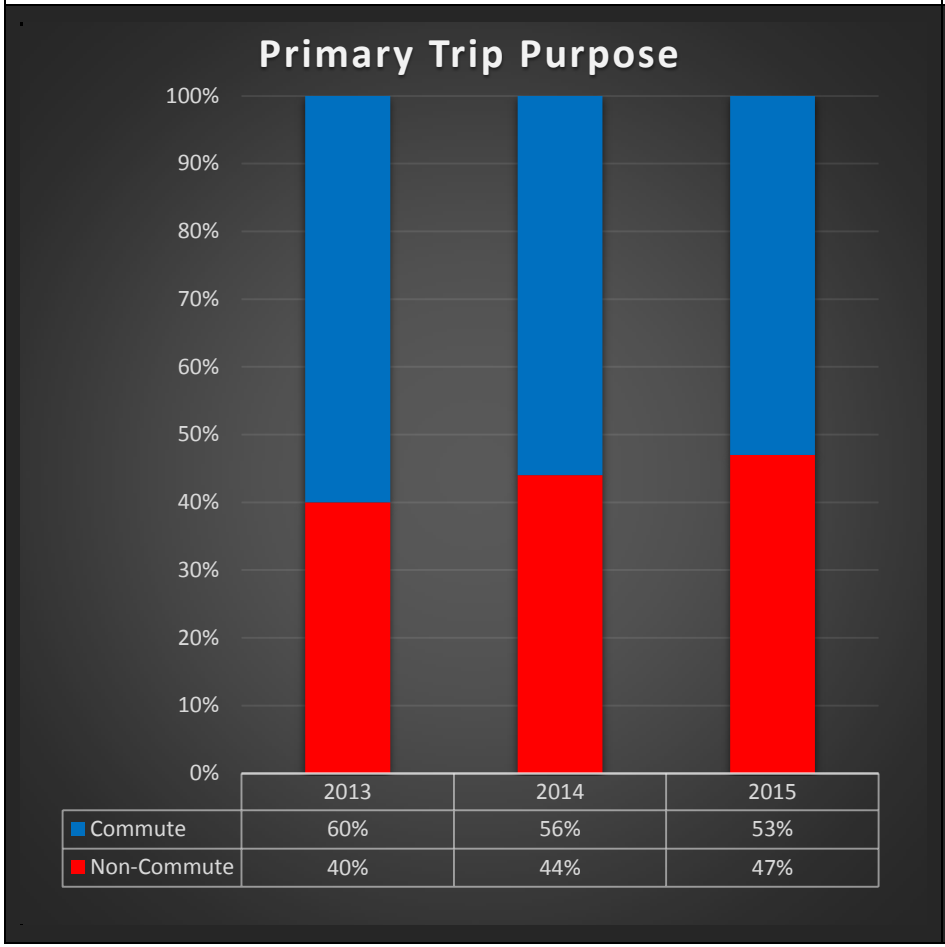


**Most Riders use Metro primarily to commute to work or school, and these Riders account for the majority of Metro trips. But a growing percentage of Riders primarily use Metro for non-commute trips.**

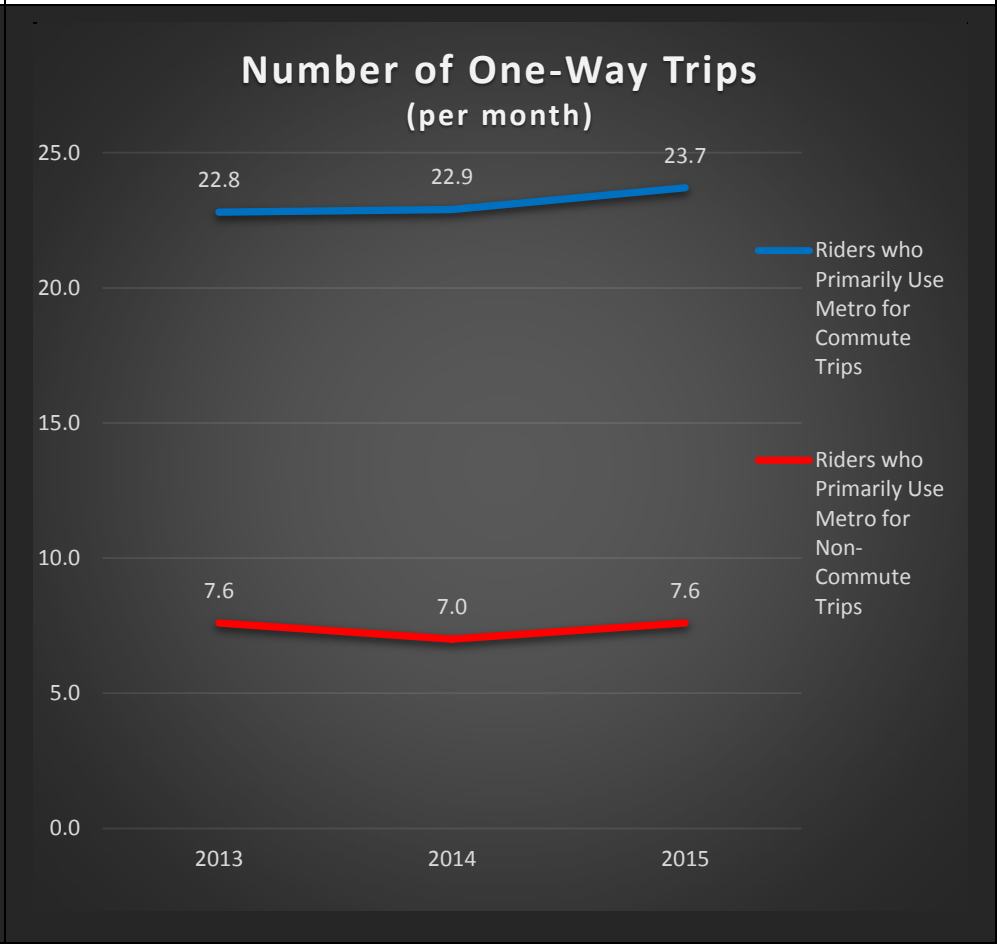
Commuting continues to be the primary trip for which Riders use Metro. However, a significant and growing percentage use Metro for non-commute trips—primarily recreation and shopping.

Riders who primarily use Metro for commute trips take three times as many monthly trips as those using Metro for non-commute trips.

Therefore, while only 53% of all Riders primarily use Metro for commute trips, they account for 77% of all monthly trips.




| | 2013 | 2014 | 2015 |
|---|---|---|---|
| Commute | 60% | 56% | 53% |
| Non-Commute | 40% | 44% | 47% |



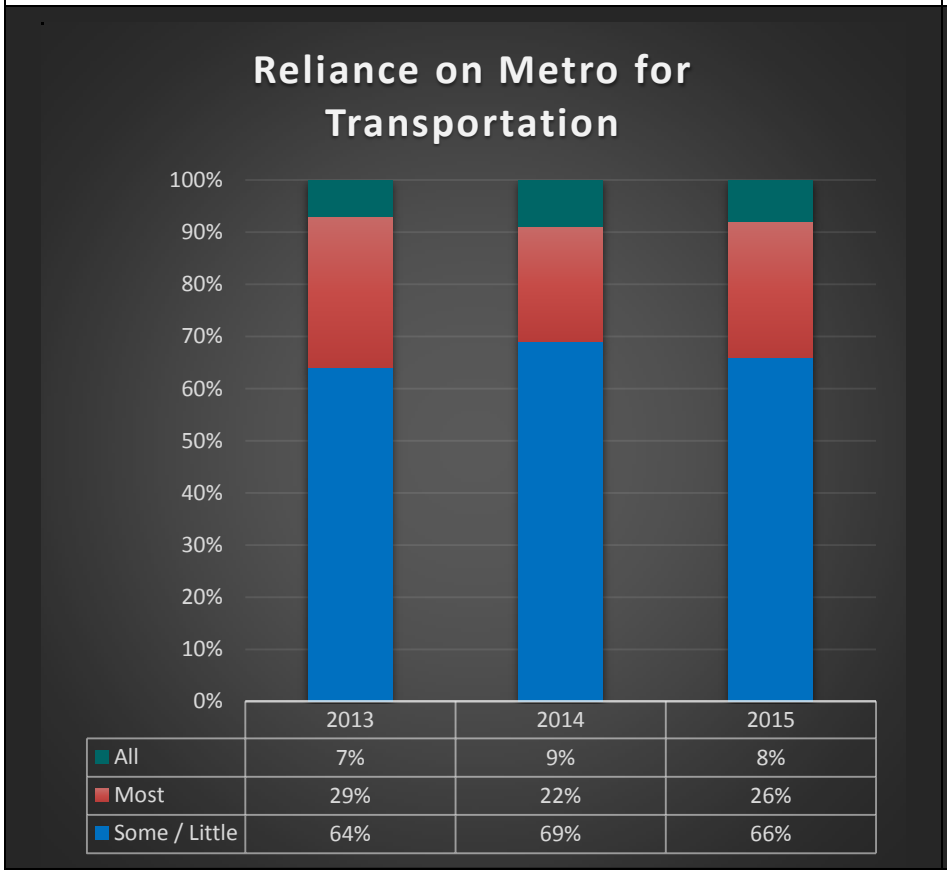
**Most Metro Riders are "Choice" Riders—that is, they have other transportation options. While the large majority of Riders have access to a vehicle, some may be choosing to give up their personal vehicles as new transportation options become available.**

The majority of Riders rely on Metro for some or very little of their transportation needs.

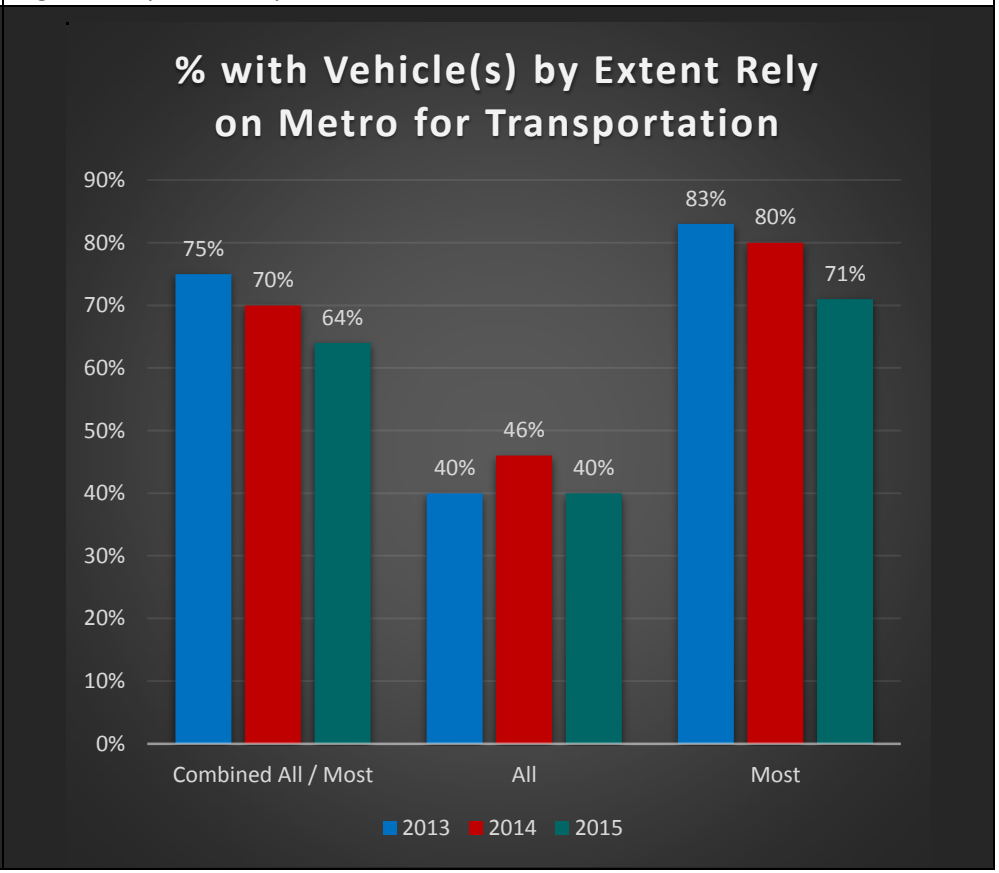
However, a relatively consistent percentage (approximately one-third) relies on Metro for all or most of their transportation.

Only one out of 10 Riders rely on Metro for all or most of their transportation needs and do not have access to a vehicle.

While the majority of those relying on Metro for all or most of their transportation needs have access to a vehicle, this percentage has decreased significantly over the years.




| | 2013 | 2014 | 2015 |
|---|---|---|---|
| All | 7% | 9% | 8% |
| Most | 29% | 22% | 26% |
| Some / Little | 64% | 69% | 66% |



## FARE PAYMENT

**Riders continue to move towards paying their fares with ORCA. Riders' fare payment methods and the products they choose to load on their ORCA card are strongly related to the frequency with which they ride.**

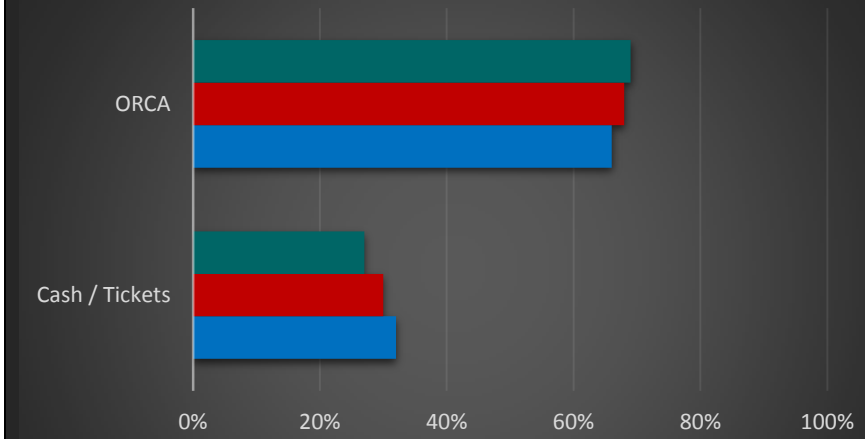
Riders' use of ORCA to pay their fare has continued to increase slowly. Use of cash or tickets has decreased since 2013.

Regular Riders are more likely than Infrequent Riders to pay with ORCA—78% compared to 51%, respectively. Eighty-five percent (85%) of all Frequent Regular Riders pay with ORCA.

Riders who pay with ORCA are somewhat more likely to have a pass than an E-Purse on their card. The percentage with a pass on their ORCA Card increased in 2015 due to a significant increase in the percentage with a monthly pass.

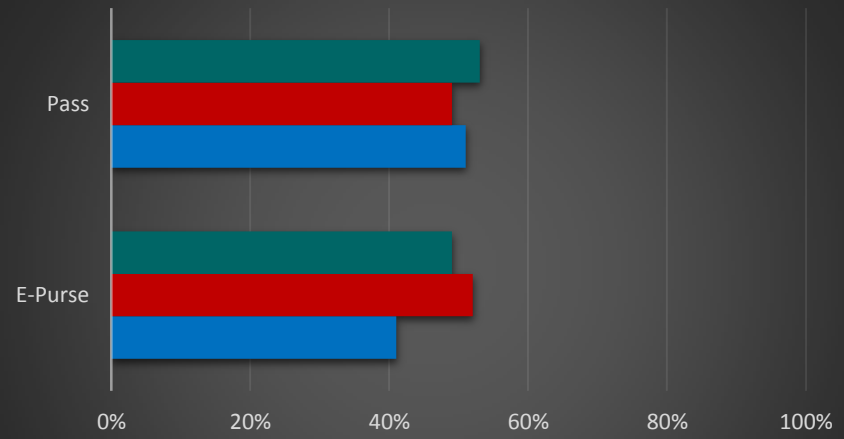
Regular Riders are more likely than Infrequent Riders to have a pass on their ORCA Card—61% compared to 25%, respectively.

### Fare Payment Method




| | Cash / Tickets | ORCA |
|---|---|---|
| 2015 | 27% | 69% |
| 2014 | 30% | 68% |
| 2013 | 32% | 66% |

### Products on ORCA



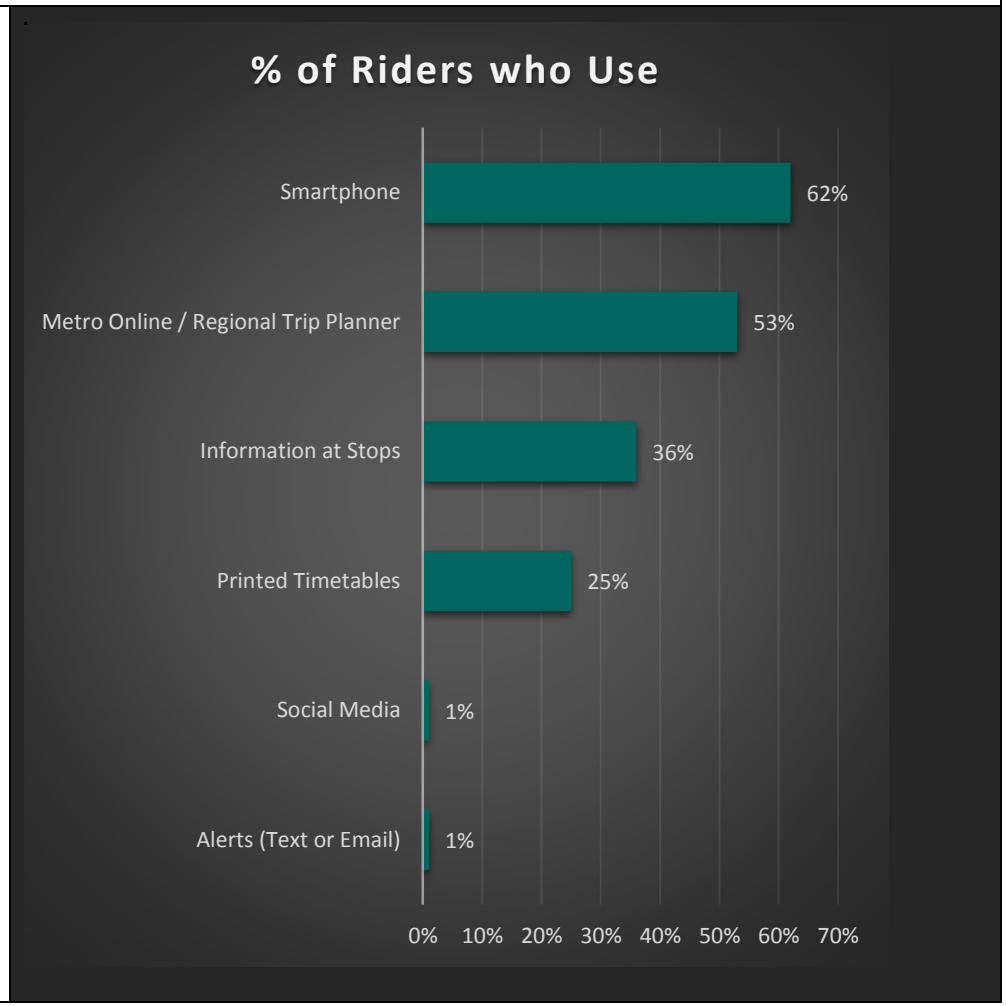

| | E-Purse | Pass |
|---|---|---|
| 2015 | 49% | 53% |
| 2014 | 52% | 49% |
| 2013 | 41% | 51% |

## INFORMATION SOURCES

**Riders rely heavily on mobile applications and online sources to get information about Metro. However, traditional sources such as information at stops and printed timetables continue to be used by those who do not own a smartphone.**

Mobile applications and online sources are the most commonly used sources of information.

While the majority of Riders now use their smartphone to get information about Metro, about one out of six (16%) surveyed Riders do not own a smartphone.



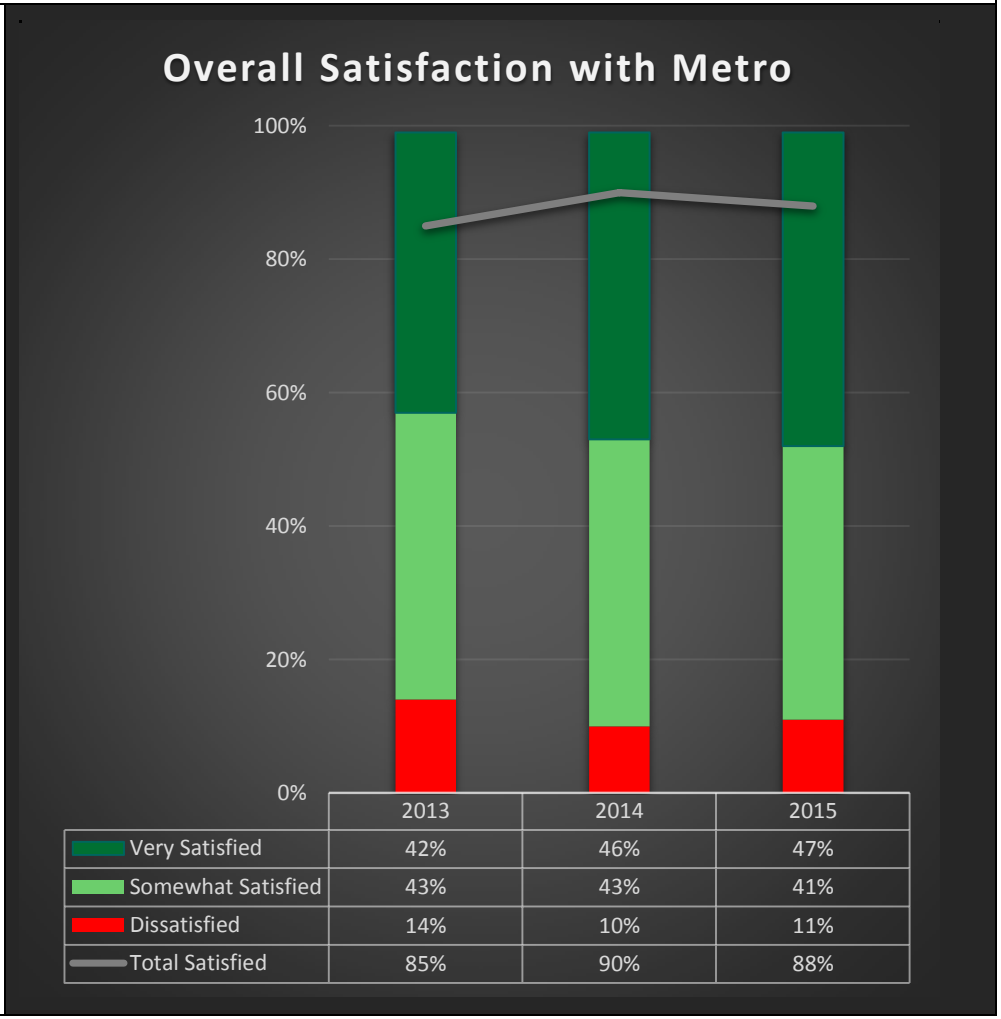
## OVERALL SATISFACTION WITH METRO

**The vast majority of Riders continue to be satisfied with Metro. Moreover, a greater percentage are "very" as opposed to "somewhat" satisfied.**

After increasing significantly in 2014 and reversing the downward trend first noted in 2011, overall satisfaction with Metro was relatively stable. The percentage of satisfied Regular Riders increased but was offset by a decrease in total satisfaction among Infrequent Riders.

| | Total Satisfied | | |
|---|---|---|---|
| | 2013 | 2014 | 2015 |
| **Regular Riders** | 88% | 88% | 90% |
| **Infrequent Riders** | 80% | 91% | 85% |

A greater percentage of Riders are "very" as opposed to "somewhat" satisfied with Metro and that difference is increasing. The percentage "very" satisfied remains below the peak (50%) in 2011.

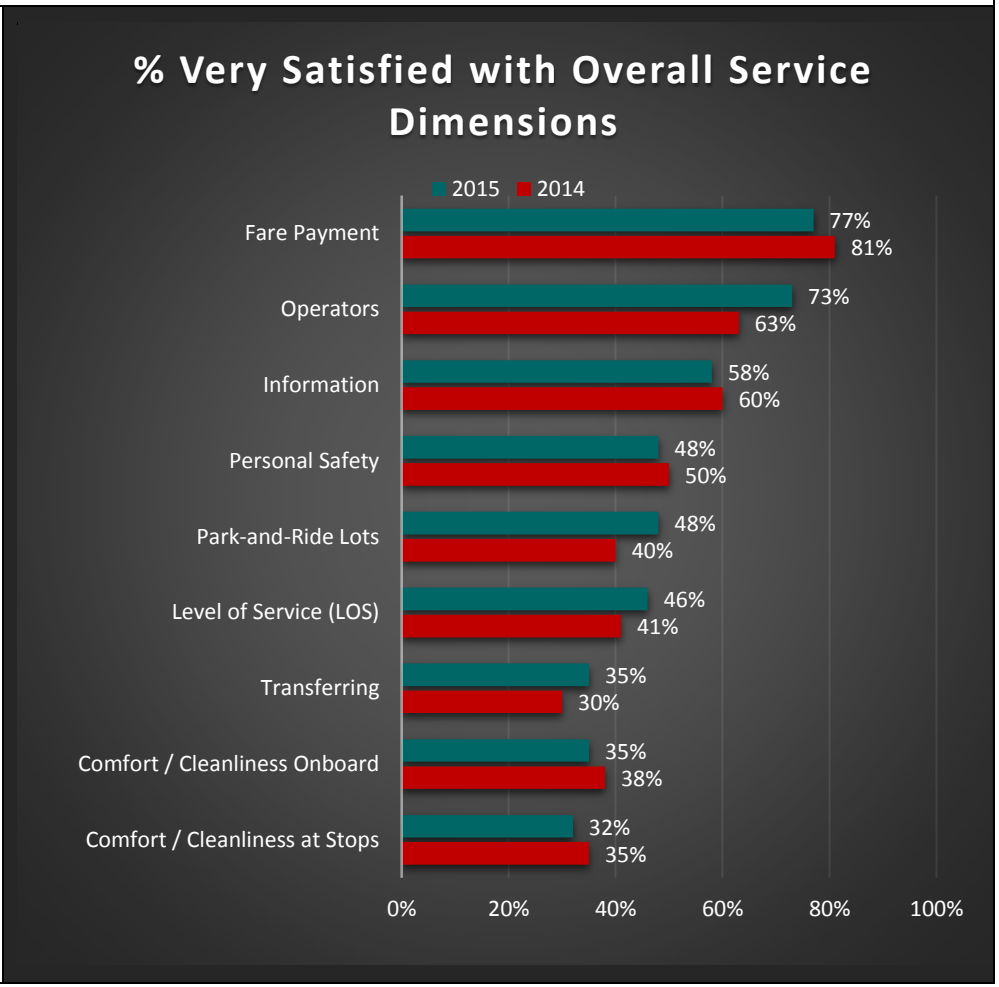


## SATISFACTION WITH INDIVIDUAL ELEMENTS OF SERVICE

**Riders are most satisfied with fare payment and coach operators, and least satisfied with comfort and cleanliness on-board and at stops.**

Consistent with the trend in overall satisfaction, the percentage of Riders "very" satisfied with each of the nine primary Service Dimensions was relatively stable. (The Service Dimensions are composites of the 42 specific service elements measured in this study.) However, there were some significant increases for:

- Metro Operators,
- Park-and-ride lots,
- Level of service, and
- Transferring.



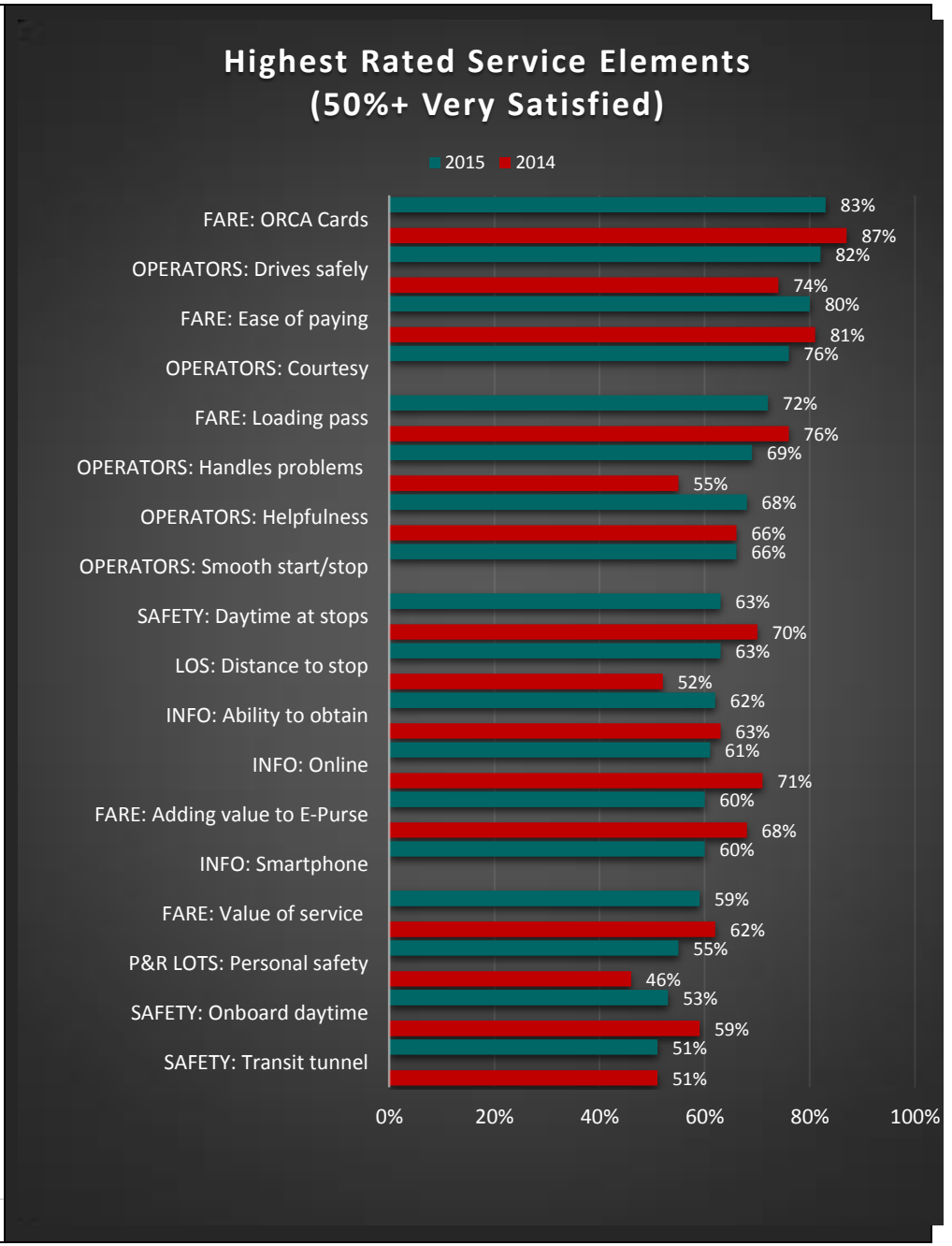
Eighteen of the 42 service elements achieved satisfaction ratings above 50% "very" satisfied. With the exception of personal safety at park-and-ride lots, all were also above 50% in 2014 as well. (Note that operator courtesy and availability of information via smartphones were rated for the first time in 2015.)

In general, ratings were similar to 2014. The percentage of "very" satisfied ratings increased significantly for:

- Personal safety at park-and-ride lots,
- How effectively operators handle problems on the buses when they occur,
- Distance from home to stops, and
- Operators' safe operation of their vehicles.

The percentage of "very" satisfied ratings decreased significantly for:

- The availability of information about Metro online,
- Ease of adding value to an E-Purse,
- Daytime safety while waiting for bus,
- Daytime safety onboard, and
- Overall satisfaction with ORCA.

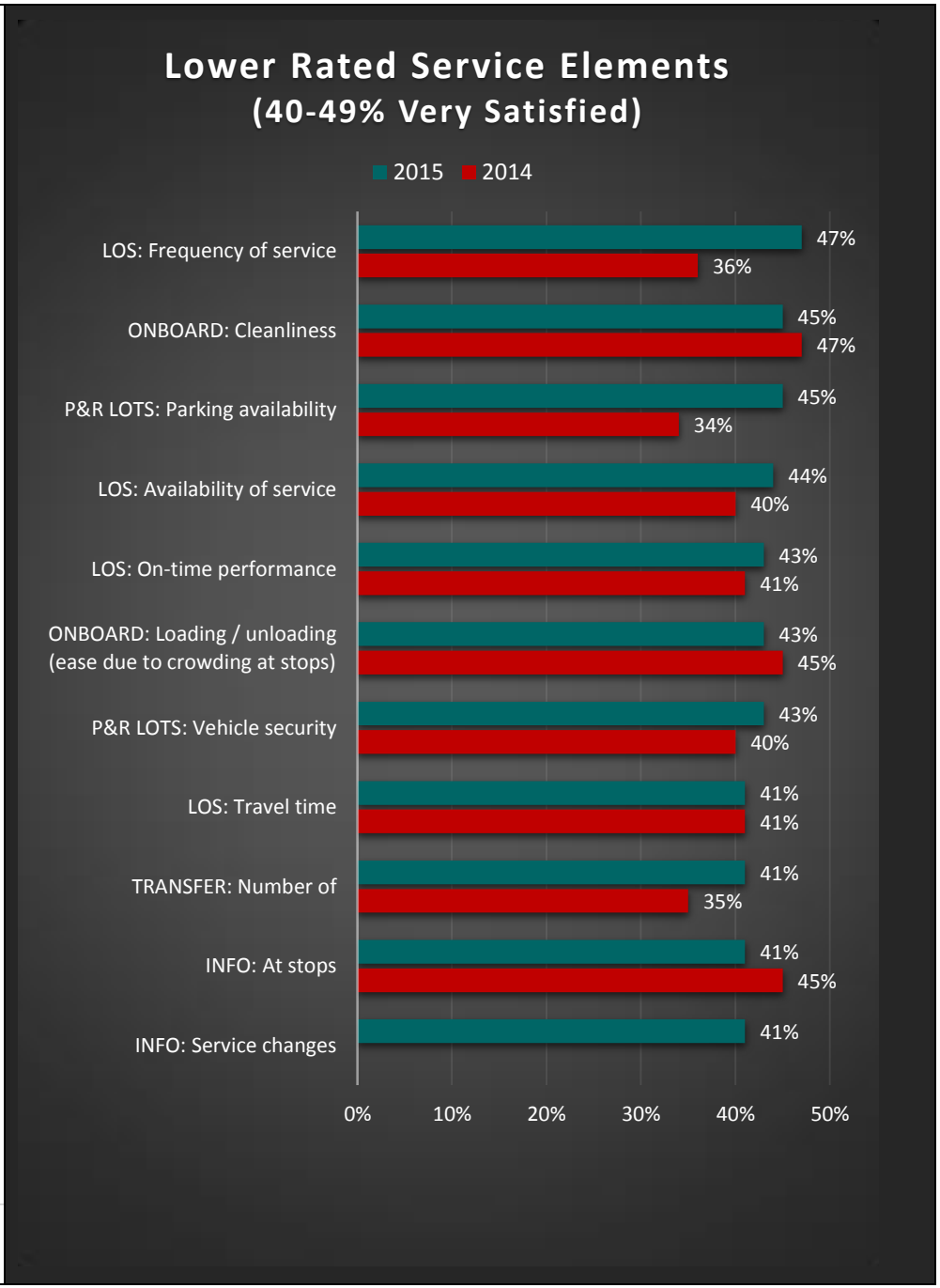


A second tier of service elements received ratings below 50% "very" satisfied but still above the lowest rated service elements (between 40 and 49% "very" satisfied). With the exception of three, all of these services were within this tier in 2014 as well.

The element regarding notifications of information about service changes was not measured in 2014 but received a rating of 41% "very" satisfied.

The percentage of Riders "very" satisfied increased significantly for:

- Frequency of service,
- Availability of parking at park-and-ride lots, and
- Number of transfers.

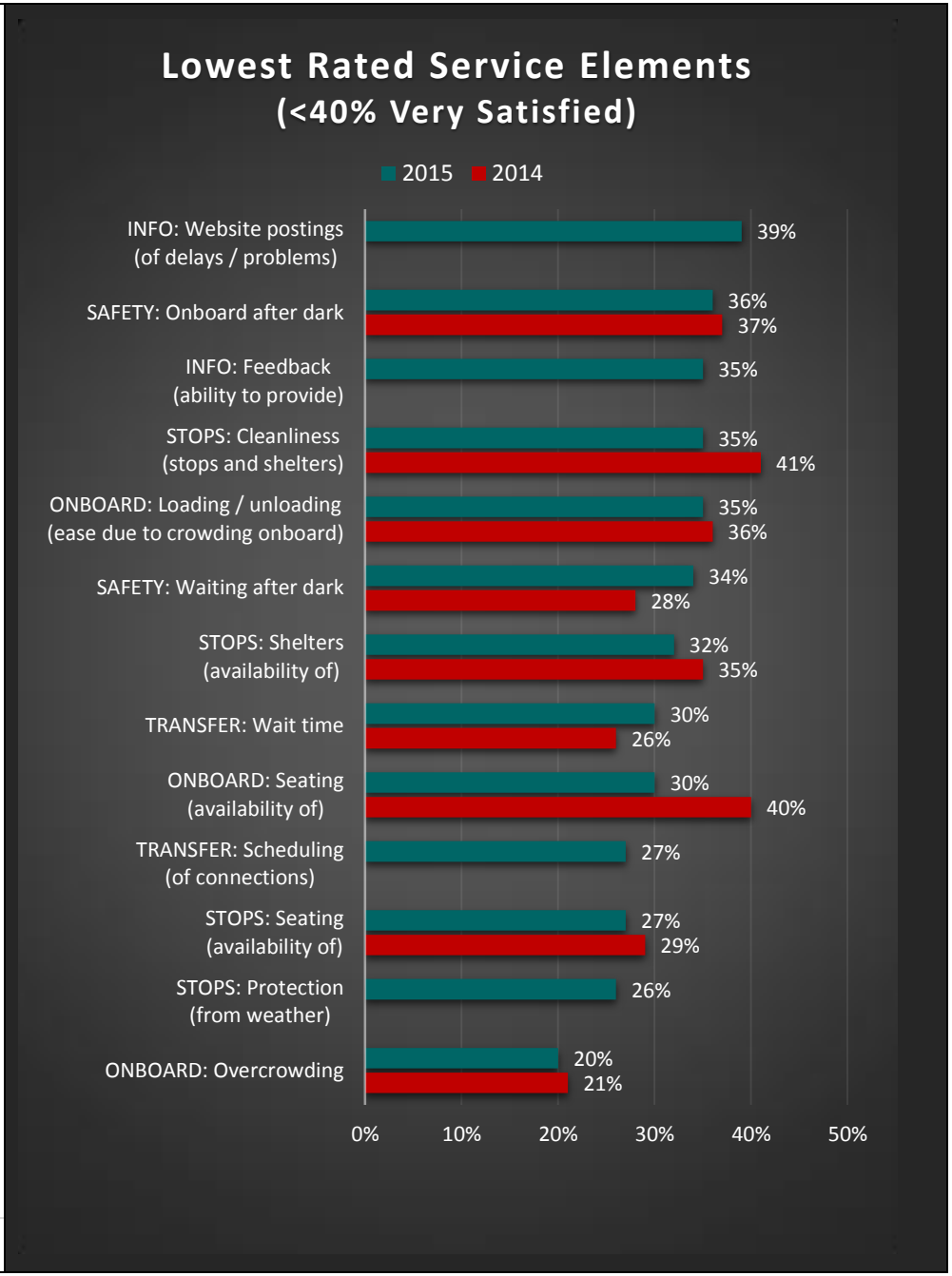


Fewer than two out of five Riders were "very" satisfied with 13 (of the 42) service elements. Four of these items were new in 2015:

- Protection from the weather when waiting, and scheduling of connections when transferring received some of the lowest ratings. Scheduling of connections received a somewhat lower rating than wait times when transferring.
- Two information items also fell into this tier: website postings of delays or problems, and the ability to provide feedback (e.g., complaints or commendations).

The remaining items were in this tier in 2014 as well.

- While still relatively low, the percentage of "Very" Satisfied Riders increased for safety while waiting after dark.
- Satisfaction decreased significantly for availability of seating on vehicles (and overcrowding is the element with the least satisfaction), and also decreased for the cleanliness of stops and shelters.

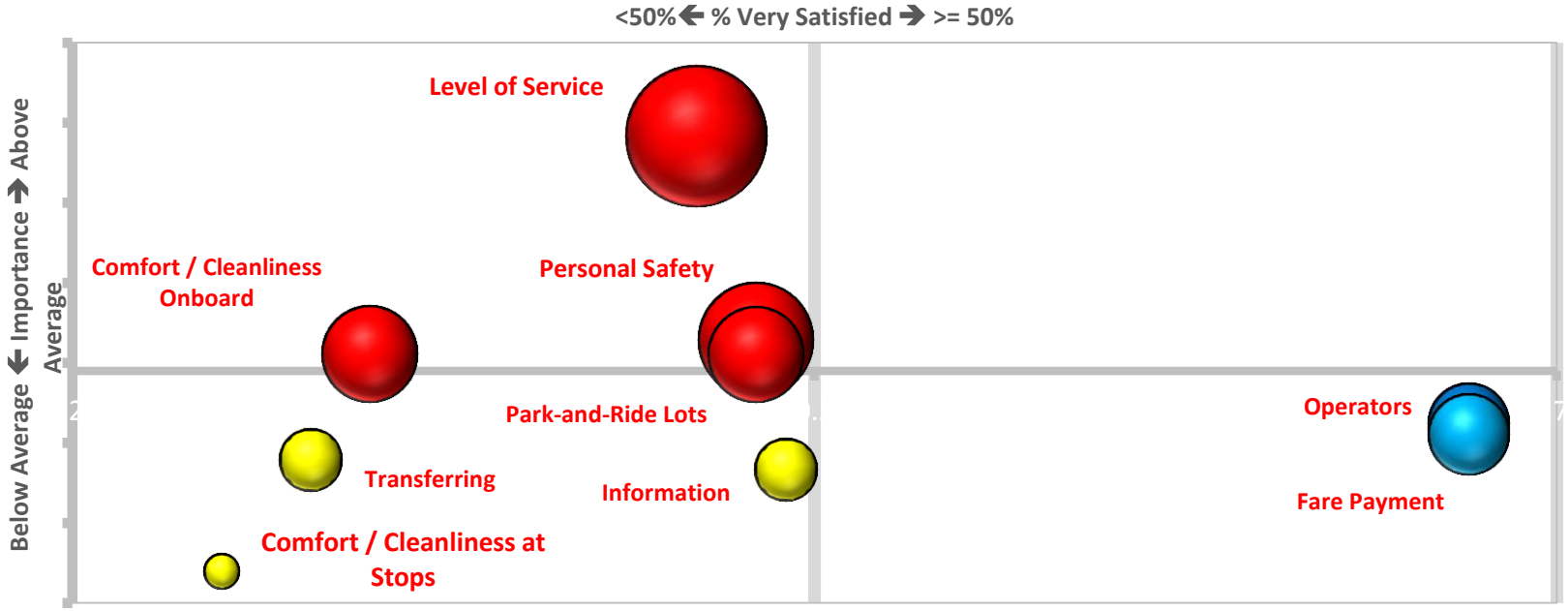


## KEY DRIVERS ANALYSIS

**"Level of Service" elements, notably travel time, availability of service, and on-time performance, are the most important target areas for continued improvements. Personal safety, particularly after dark, and comfort of the vehicles, notably at it relates to crowding, are also important targets for improvements.**

The Key Drivers Analysis identifies the extent to which the overall service dimensions and the individual service elements influence Riders' overall satisfaction with—and expectations of—Metro. Satisfaction ratings are used to identify priorities for improvements and services to maintain.

Level of Service is by far the single largest driver of Riders' overall satisfaction with and perceptions of Metro. Satisfaction is below 50% and therefore the Level of Service should be a priority for improvement. Personal safety is the second key driver. Satisfaction with safety after dark is significantly lower than daytime safety and should be a continued priority. While Comfort and Cleanliness On-Board is somewhat less important, it has one of the lowest percentages of "very" satisfied ratings and should also be considered a primary target for improvement.



All elements within the Level of Service dimension are key drivers.

- Travel time is by far the most important driver (nearly twice as important as any other element) and receives the lowest rating.
- Improvements in frequency of service may contribute to the somewhat lower importance of this element of service than seen in previous years.

All elements of service within the Personal Safety dimension are key drivers.

- Safety after dark should be a primary focus. However, daytime safety should be carefully monitored as satisfaction decreased in 2015.

All elements of service within the Comfort and Cleanliness Onboard dimension are key drivers.

- Inside cleanliness is the most significant driver.

Other target areas for improvement include:

- Vehicle security and parking availability at park-and-ride lots,
- Number of transfers,
- Ability to provide feedback, and
- Protection from the weather either through shelters or other means (such as building awnings).

*The table to the right is ordered by the importance of the Dimensions followed by the importance of the Elements within the dimension. Elements in bold are significant drivers. Some Elements are not included due to small base sizes. The dimension scores are based on all elements, including new ones this year.*

| | Importance Rank | % Very Satisfied | Strategy |
|---|---|---|---|
| **Level of Service** | **1** | **46%** | **Improve** |
| **Travel Time** | 1 | 41% | Improve |
| **Availability of Service** | 2 | 44% | Improve |
| **On-Time Performance** | 3 | 43% | Improve |
| **Distance to Stop** | 4 | 63% | Monitor |
| **Frequency of Service** | 5 | 47% | Strategically Target |
| **Personal Safety** | **2** | **48%** | **Improve** |
| **Onboard During the Day** | 1 | 53% | Maintain |
| **Onboard After Dark** | 2 | 36% | Improve |
| **Waiting at Stops After Dark** | 3 | 34% | Improve |
| **Waiting at Stops During the Day** | 4 | 63% | Monitor |
| **Downtown Transit Tunnel** | 5 | 51% | Monitor |
| **Comfort and Cleanliness Onboard** | **3** | **35%** | **Improve** |
| **Inside Cleanliness** | 1 | 45% | Improve |
| **Ease of Loading/Unloading (due to crowding at stops)** | 2 | 43% | Improve |
| **Overcrowding** | 3 | 20% | Improve |
| **Ease of Loading/Unloading (due to crowding onboard)** | 4 | 35% | Strategically Target |
| **Availability of Seating** | 5 | 30% | Strategically Target |
| **Park-and-Ride Lots** | **4** | **48%** | **Improve** |
| **Personal Safety** | 1 | 55% | Maintain |
| **Vehicle Security** | 2 | 43% | Improve |
| **Parking Availability** | 3 | 45% | Improve |
| **Metro Operators** | **5** | **72%** | **Monitor** |
| **Handles Problems Effectively** | 1 | 69% | Maintain |
| **Courtesy** | 2 | 76% | Maintain |
| **Operates Vehicles Safely** | 3 | 82% | Maintain |
| **Starts / Stops Vehicles Smoothly** | 4 | 66% | Monitor |
| **Helpfulness with Information** | 5 | 68% | Monitor |
| **Fare Payment** | **6** | **72%** | **Monitor** |
| **Value of Service** | 1 | 59% | Maintain |
| **ORCA Cards** | 2 | 83% | Monitor |
| **Ease of Paying Fares (when boarding)** | 3 | 80% | Monitor |
| **Transferring** | **7** | **33%** | **Strategically Target** |
| **Number of Transfers** | 1 | 41% | Improve |
| **Scheduling of Connections** | 2 | 27% | Strategically Target |
| **Wait Time when Transferring** | 3 | 30% | Strategically Target |
| **Information Sources** | **8** | **49%** | **Strategically Target** |
| **Ability to Provide Feedback** | 1 | 35% | Improve |
| **Availability of Information Online** | 2 | 61% | Maintain |
| **Notification of Service Changes** | 3 | 41% | Strategically Target |
| **Availability of Information at Stops** | 4 | 41% | Strategically Target |
| **Availability of Information via Smartphones** | 5 | 60% | Monitor |
| **Comfort and Cleanliness at Stops** | **9** | **30%** | **Strategically Target** |
| **Protection from the Weather** | 1 | 26% | Improve |
| **Availability of Shelters** | 2 | 32% | Improve |
| **Cleanliness of Stops / Shelters** | 3 | 35% | Strategically Target |
| **Availability of Seating** | 4 | 27% | Strategically Target |